

# CRM AUDIT

Choosing Customer Relationship Management (CRM) or Marketing Automation software providers throws up a lot of options.

## ARE YOU USING THE RIGHT CRM? WHAT CRM SHOULD YOU CHOOSE?



pipedrive



The top reasons for CRM implementation failure are

**Poor Objectives, Poor CRM Strategy and Project Scope Creep.**

None of these reasons relate to poor CRM platforms

It is about preparation, process and laying good foundations within your business

**Don't persevere with CRM...let Cymer help your flourish with it!**

## THE AUDIT

Cymer Marketing Solutions carry out these audits to get a better understanding of your organisation and what you are looking to achieve from implementing CRM into the operations. The key areas that are focused on are:

- Current operational structure
- Current platform(s), function(s) and processes
- Data management
- User/Stakeholder assessments
- Implementation and subscription budget
- Expected outcomes



Results of the audit are summarised in an Operational Traffic Light report to highlight changes required and where operation efficiencies can be gained. Suggestions for matching CRM platforms fitting your requirements will be given alongside pricing.

## ADVANTAGES HAVING A CRM AUDIT

- As an independent CRM consultancy, Cymer Marketing Solutions assesses the whole market.
- Experience across many CRM platforms provides additional insights and creative solutions.
- Provides a comprehensive report to help with Stakeholder management and manage expectations.
- Narrows your platform selection to those that will deliver your objectives.

Your foundations need to be solid in order to successfully implement a platform. Having an independent CRM Audit can save you £000s in missed opportunities, reduce implementation time and deliver more efficient operations.

[cymermarketing.co.uk/crm-audit](http://cymermarketing.co.uk/crm-audit)